TASMANIAN TOURISM SNAPSHOT

YEAR ENDING MARCH 2024

Lake Oberon, Western Arthur Range
Southwest National Park
©Mark Reid

TASMANIA
COME DOWN FOR AIR

Tourism Tasmania

TASMANIAN TOURISM SNAPSHOT

OVERVIEW AT YE MARCH 2024

Post-pandemic recovery peaked a year ago (year ending March 2023) when significant pent-up demand for travel among Australians saw Tasmania experience record spend and a near full recovery of visitation, despite very low levels of international travel at that time.

As international borders opened and overseas outbound travel increased, the latter half of calendar year 2023 saw a softening in interstate travel by Australians into Tasmania. In year ending March 2024, however, a strong rebound in visitation through summer 2023-24, coupled with increasing rates of return from key international markets, drove a reversal of that trend, leading to elevated spend and nights (up 40% and 24%, respectively) and almost full recovery (down 5%) of visitation compared to the same period in 2019.

Meanwhile, the share of domestic versus international visitors to the state has settled to pre-COVID levels, with the market share for international visitation in the year ending March 2024 at 16.5% (up 0.9 ppts compared to 2019).

The data presented in this report, as well as visitor behaviours and demographics, can be explored in greater detail using the free, online interactive TVS Analyser dashboard www.tvsanalyser.com.au

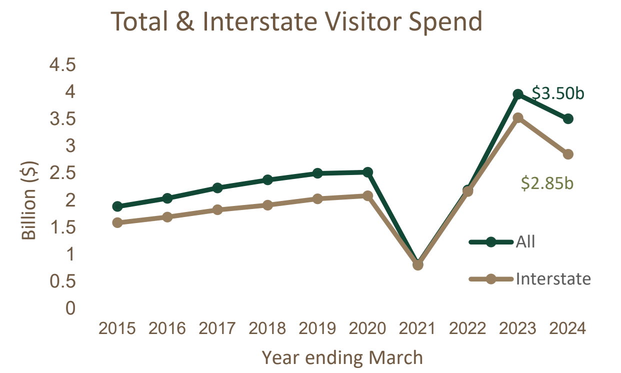
KEY INSIGHTS

- Interstate and international visitors continue to stay longer in the state, setting a new record high for nights, with interstate visitors in particular staying more than two nights longer than in 2019.
- Tasmanians took more overnight holiday trips (+16%) and spent $406 million within the state compared to 2023.
- The increase in nights and average length of stay is led by visitors bringing their own car or 4WD across on the Spirit of Tasmania, with these visitors staying an extra five nights, on average, than they were in 2019.
- Visitors are still spending far more each compared to before the pandemic (around +$860), although some slowing down in spending is evident as rising costs of living places pressure on households and travel decisions. However, increasing costs of operating businesses may erode the benefit of this increased spend for operators.
- There were more visitors from USA and Germany compared to the same period in 2019, while international visitation to Tasmania overall had not quite fully recovered to pre-COVID levels in YE March 2024.

YEAR ENDING MARCH 2024

VISITOR SPEND

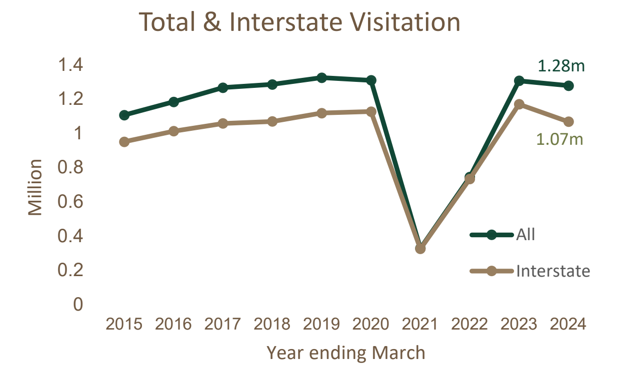
In the year ending (YE) March 2024, total spend across all interstate & international visitors was $3.5 billion, up 1.01 billion (40.3%) from 2019. Although visitors spent around $860 more each than in 2019, their average spend has fallen by 10% from YE March 2023, pulling total expenditure down 11.5%.



VISITOR SPEND	YE Mar 23	YE Mar 24	Annual Change[1]	Change vs YE Mar 2019
ALL[2]	$3.955b	$3.500b	-11.5%	+40.3%
INTERSTATE	$3.521b	$2.848b	-19.1%	+40.7%

TOTAL VISITORS

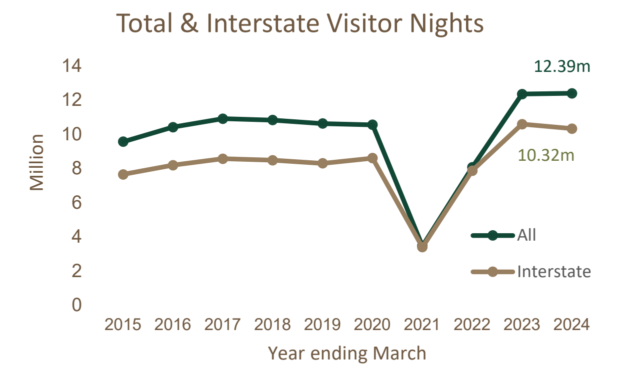
Tasmania welcomed 1.277m visitors in the year ending March 2024, of which 16.5% were international visitors, demonstrating the return of Tasmania's international market share to pre-COVID levels.



TOTAL VISITORS	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	1,305,404	1,277,500	-2.1%	-3.5%
INTERSTATE	1,168,675	1,067,100	-8.7%	-4.5%

VISITOR NIGHTS

The year ending March 2024 set a new record for total visitor nights (12.4m), primarily due to interstate visitors spending an extra two nights, on average, in the state than they did in 2019 (average length of stay for all visitors was 9.7 nights).

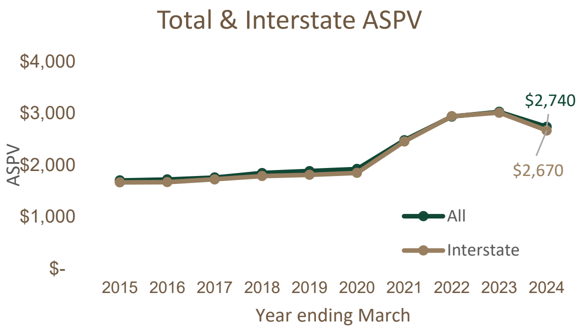


VISITOR NIGHTS	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	12.35m	12.39m	+0.4%	+16.7%
INTERSTATE	10.59m	10.32m	-2.5%	+24.5%

KEY METRICS

AVERAGE SPEND PER VISITOR (ASPV)

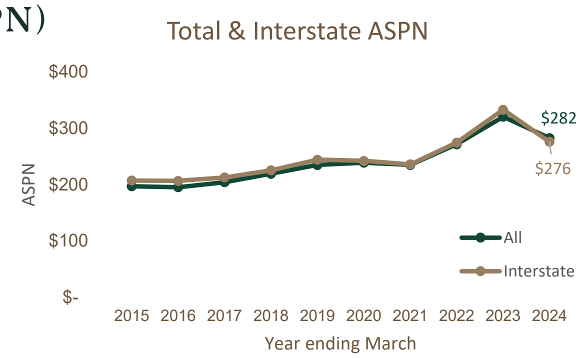
Average spend per visitor (ASPV) was $2,740 in year ending March 2024, 45% more than the same period in 2019. Interstate holiday visitors spent an average $3,632 each (up 47% or +$928 from 2019). While visitors spent more per visit, this expenditure may not flow through to tourism businesses' bottom lines due to the rising costs of living and doing business. Accommodation is traditionally the largest spend category for interstate holiday visitors, and rose to 47% of their total spend in the year ending March 2024 (up from 43% in 2019).



VISITOR SPEND	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	$3,030	$2,740	-$290/visit	+$856/visit
INTERSTATE	$3,013	$2,670	-$343/visit	+$857/visit

AVERAGE SPEND PER NIGHT (ASPN)

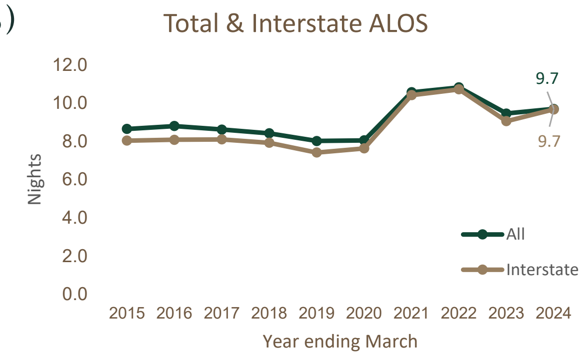
Although visitor expenditure remained elevated compared to 2019, longer stays in the state in year ending March 2024 led to overall declines in average spend per night for all visitors. ASPN was $282, up 20% on 2019, but down 12% on the post-COVID peak in 2023. Interstate holiday visitors spent an extra $57 per night compared to 2019, but $47 less than 2023 ($394).



TOTAL VISITORS	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	$320	$282	-$38/night	+$48/night
INTERSTATE	$333	$276	-$57/night	+$32/night

AVERAGE LENGTH OF STAY (ALOS)

While average length of stay was up 1.7 nights on 2019 and on par with 2023, there has been a loss of around 1 night since the peaks in ALOS seen in 2021 and 2022. Elevated ALOS is primarily driven by interstate visitors, who are staying up to 2 nights longer on average; of these, holiday-makers stayed 10.2 nights (up 1.2 nights on 2019 and similar to 2023) and VFR stayed 9.1 nights (up 2 nights on 2019 and half a night on 2023).



VISITOR NIGHTS	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
ALL	9.5	9.7	+0.2 nights	+1.7 nights
INTERSTATE	9.1	9.7	+0.6 nights	+2.3 nights

KEY MARKETS

INTERSTATE MARKETS

The vast majority of Tasmania's visitors are from interstate (84%), with VIC, NSW and QLD accounting for 70% of all visitors to the state (or 84% of interstate visitors).

VICTORIA

Traditionally the largest single market, VIC has still not fully recovered to pre-COVID visitation (down 17% on 2019), although expenditure is 29% higher than 2019. Holiday visitors saw a stronger return in YE Mar 2024, but were down 4% on 2019.

NEW SOUTH WALES

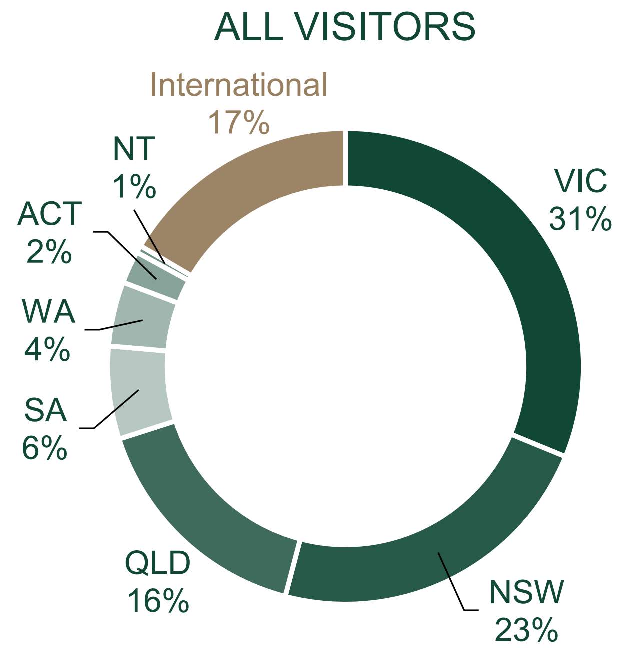
NSW holiday-makers exceeded 2019 levels (+7%), with spend also up 35%. Total NSW visitation did not however recover to 2019 levels over the year (-5% on 2019), although spend was up 32%.

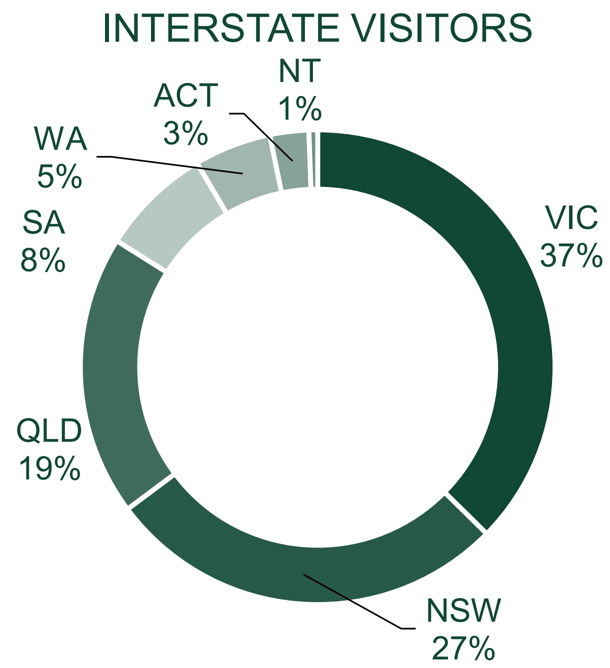
QUEENSLAND

QLD was the only market of the top three to see more visitors (+19%) and spend (+56%) than in 2019. QLD holiday visitors also exceeded pre-COVID visitation (+42%) and expenditure (+75%) in the year ending March 2024.

SOUTH AUSTRALIA

In the year ending March 2024, SA set spend and visitation records across both total and holiday visitors. This equates to an additional 20,000 South Australian visitors and $130m annually compared to 2019. As a result, SA's share of the interstate market increased to 8% (up 2 ppts from 2023 and 3 ppts from 2019).





INTERNATIONAL MARKETS

Tasmania's international visitor recovery is lagging slightly behind the national average, at 79% of YE March 2019 compared to 84% nationally. This is due to Tasmania traditionally seeing a higher than average proportion of its international visitors visiting for a holiday, rather than to see friends or relatives, on business, or for education.

In the year ending March 2024, Tasmania's share of holiday visitors to Australia was 4.6% (5.1% in 2019). There has been a slower recovery of this market nationally (75% of 2019 levels), impacting Tasmania's overall international visitor recovery.

TOTAL VISITORS TO TASMANIA

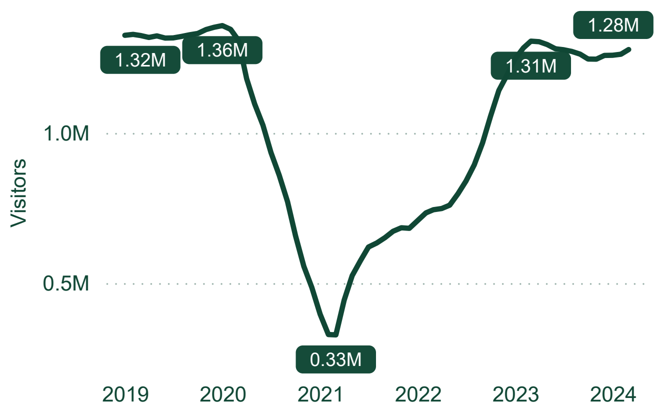
ALL VISITORS*

1.28M	12.39M	$3.5bn	9.7	$2.740K	$282
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▼ -2.1%	▲ 0.4%	▼ -11.5%	▲ 2.6%	▼ -9.6%	▼ -11.8%
96.5% of 2019	116.7% of 2019	140.3% of 2019	120.9% of 2019	145.4% of 2019	120.2% of 2019

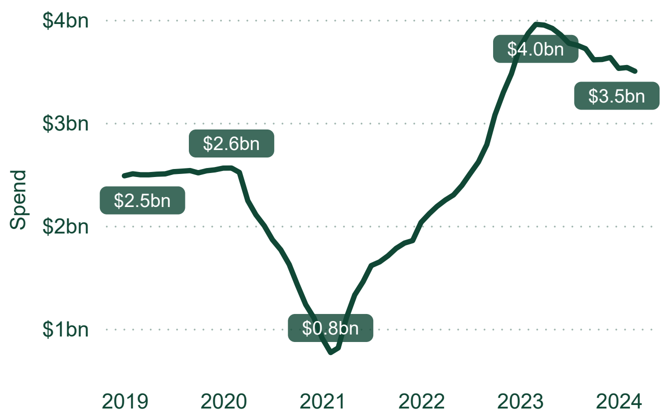
ALL HOLIDAY VISITORS

699.49K	6.84M	$2.49bn	9.8	$3.561K	$364
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▼ -0.4%	▼ -0.8%	▼ -9.9%	▼ -0.4%	▼ -9.6%	▼ -9.2%
110.9% of 2019	121.6% of 2019	149.5% of 2019	109.7% of 2019	134.8% of 2019	122.9% of 2019

ROLLING ANNUAL VISITATION TO TASMANIA

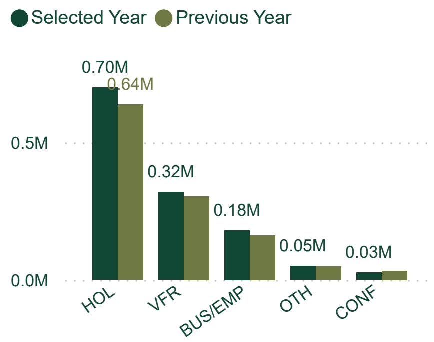


ROLLING ANNUAL SPEND IN TASMANIA

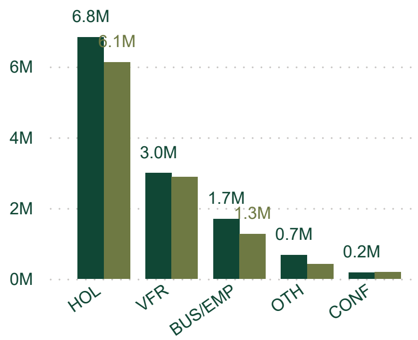


PURPOSE OF VISIT TO TASMANIA

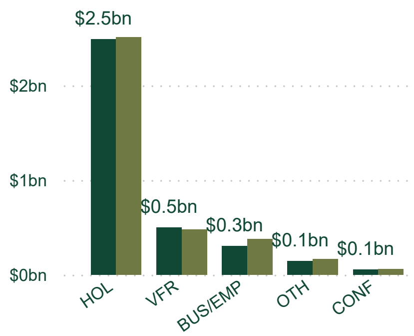
VISITORS



NIGHTS



SPEND



▲ Increase
▼ Decrease

% Change is from previous year.
* Total visitors is interstate and international, excluding Tasmanians and cruise ships.

ALOS: Average length of stay (nights);
ASPV: Average spend per visitor;
ASPN: Average spend per night.
More data available at www.tvsanalyser.com.au
The Tasmanian Visitor Survey is an exit survey of approximately 9,000 interstate and international visitors annually. Roy Morgan Research.
Image: Lake Oberon, Western Arthur Range, Mark Reid.

INTERSTATE VISITORS TO TASMANIA

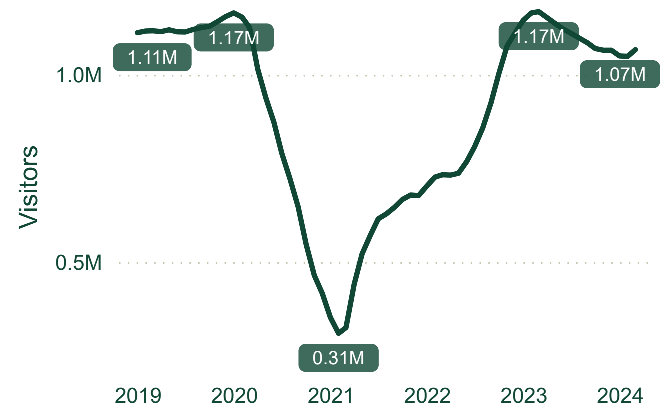
ALL INTERSTATE VISITORS*

1.07M	10.32M	$2.85bn	9.7	$2.670K	$276
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▼ -8.7%	▼ -2.5%	▼ -19.1%	▲ 6.8%	▼ -11.4%	▼ -17%
95.5% of 2019	124.5% of 2019	140.7% of 2019	130.4% of 2019	147.3% of 2019	113% of 2019

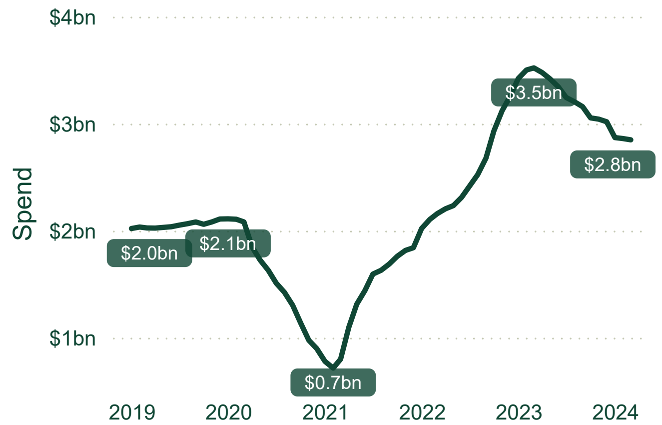
INTERSTATE HOLIDAY VISITORS

543.41K	5.52M	$1.97bn	10.2	$3.632K	$357
Visitors	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPV	ASPN
▼ -11.4%	▼ -9.2%	▼ -19.7%	▲ 2.5%	▼ -9.3%	▼ -11.5%
111.8% of 2019	126.2% of 2019	150.2% of 2019	112.8% of 2019	134.3% of 2019	119.1% of 2019

ROLLING ANNUAL VISITATION TO TASMANIA



ROLLING ANNUAL SPEND IN TASMANIA



STATE OF ORIGIN

							% Share visitors from state			
States	Visitors	Nights '000	Spend $m	ALOS	ASPV	ASPN	Holiday	VFR	Business	Other
VIC	398,600	3,026	$844	7.6	$2,118	$279	46%	27%	20%	5%
NSW	292,300	2,785	$833	9.5	$2,851	$299	55%	26%	14%	4%
QLD	204,100	2,373	$619	11.6	$3,031	$261	54%	27%	13%	3%
SA	80,600	774	$230	9.6	$2,853	$297	55%	25%	13%	5%
WA	56,000	874	$218	15.6	$3,890	$249	56%	29%	7%	5%
ACT	28,300	311	$76	11.0	$2,677	$244	42%	33%	15%	7%
NT	6,300	174	$26	27.6	$4,094	$148	45%	25%	17%	10%

▲ Increase
▼ Decrease

% Change is from previous year.
* Interstate refers to Australian travellers, excluding Tasmanians and cruise.

ALOS: Average length of stay (nights);
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More data available at www.tvsanalyser.com.au

The Tasmanian Visitor Survey is an exit survey of approximately 9,000 interstate and international visitors annually. Roy Morgan Research.

REGIONAL VISITATION

While visitation to the state in year ending March 2024 was only slightly (2%) below the previous year, there were mixed results across the regions.

The Southern and East Coast tourism regions saw record visitation, whereas Northern and West by North West (WxNW) saw declines from 2023. All regions saw declines in visitation from interstate visitors, indicating that the gains for the Southern and East regions was driven largely by international visitation rebounding.

The decline for the Northern tourism region follows a period of softening seen through 2023 as fewer visitors in the state for holidays or to visit friends or relatives included the region in their trip, though this significantly eased from late 2023 and through the peak summer season. The WxNW tourism region has been, and continues to, follow a similar trend to the North.

A number of destinations around the state also individually saw new records for nights spent in their areas, including Stanley (+93%), Bruny Island (+81%), Bicheno (+38%), Derby (+26%) and Hobart City (+19%). The full list of where visitors go and how long they stay can be found on the interactive online TVS Analyser.

ALL VISITORS	Visitors			Nights		
	2024	Annual Change	Change on 2019[3]	2024	Annual Change	Change on 2019
SOUTHERN	1,115,300	5%	7%	6,323,500	10%	28%
NORTHERN	663,100	-7%	-7%	1,863,700	-12%	-14%
W X NW	531,900	-6%	2%	2,301,600	-3%	12%
EAST	440,900	5%	25%	1,101,200	1%	37%

INTERSTATE VISITORS	Visitors			Nights		
	2024	Annual Change	Change on 2019[3]	2024	Annual Change	Change on 2019
SOUTHERN	918,300	-2%	7%	5,231,100	6%	34%
NORTHERN	526,500	-17%	-10%	1,580,700	-17%	-5%
W X NW	432,800	-14%	2%	1,950,700	-2%	21%
EAST	332,600	-7%	28%	853,100	-7%	43%

ATTRACTIONS

Despite total visitation to the state remaining below levels seen pre-COVID, visitors are including more attractions per trip than before, including those in regional areas. The 2023/24 summer season was primarily responsible for driving this trend.

Regional dispersal to attractions didn't come at the expense of attractions in Hobart, with Salamanca Market seeing an increase on summer 2022-23.

Tasmania's wilderness and wildlife are significant drivers of visitation to the state, with 43% of all visitors citing these experiences as an influence to visit, up 4ppts from 2019.

41% of all visitors to the state visited at least one national park, up 2ppts on 2019.

47% of visitors undertook a bushwalk (any duration), up 3%pts on 2019.

VISITATION TO TOURISM REGION

INTERSTATE AND INTERNATIONAL

VISITORS TO REGIONS

Southern	Northern	West x North West	East Coast
1.12M ▲ 5.4%	663.12K ▼ -7.1%	531.94K ▼ -6.4%	440.94K ▲ 5%
106.8% of 2019	93.4% of 2019	101.7% of 2019	125.1% of 2019

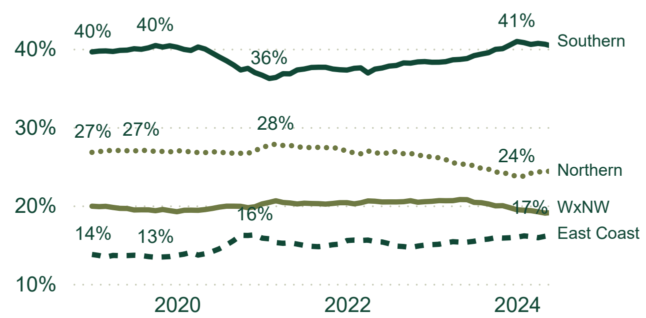
OVERNIGHT VISITORS^

Southern	Northern	West x North West	East Coast
1.05M ▲ 5.3%	490.54K ▼ -10.5%	413.31K ▼ -8.7%	339.52K ▼ -0.3%
106.9% of 2019	92.2% of 2019	101.6% of 2019	117.4% of 2019

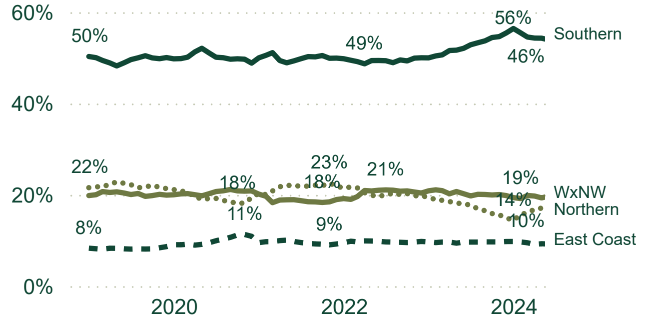
NIGHTS IN REGIONS

Southern	Northern	West x North West	East Coast
6.32M ▲ 10.2%	1.86M ▼ -12.5%	2.30M ▼ -2.8%	1.10M ▲ 0.7%
5.7 ALOS	2.8 ALOS	4.3 ALOS	2.5 ALOS

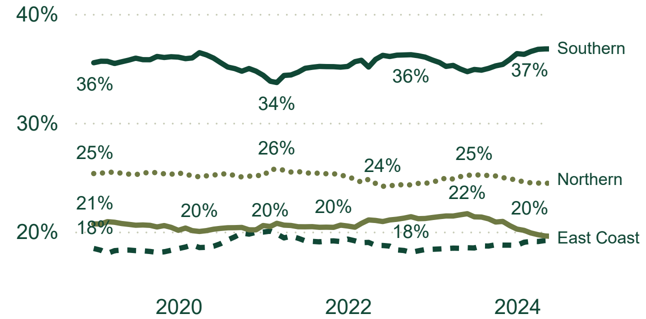
ROLLING ANNUAL SHARE* OF VISITORS BY REGION



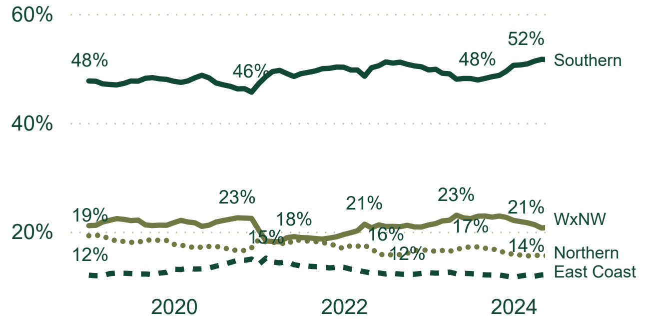
ROLLING ANNUAL SHARE OF NIGHTS BY REGION



ROLLING ANNUAL SHARE OF HOLIDAY VISITORS



ROLLING ANNUAL SHARE OF HOLIDAY NIGHTS



▲ Increase
▼ Decrease

% Change is from previous year.
^ Visitors who stayed at least one night in the region.
* Share of visitors refers to share of total to the state

ALOS: Average length of stay (nights);
ASPV: Average spend per visitor;
ASPN: Average spend per night.
More data available at www.tvsanalyser.com.au

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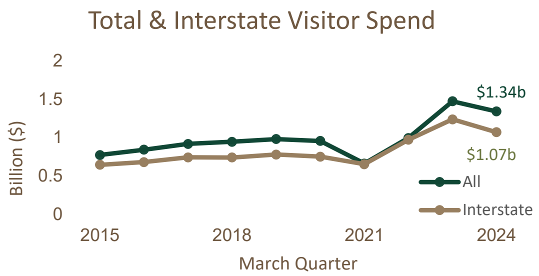
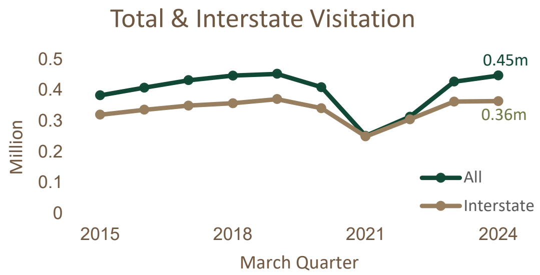
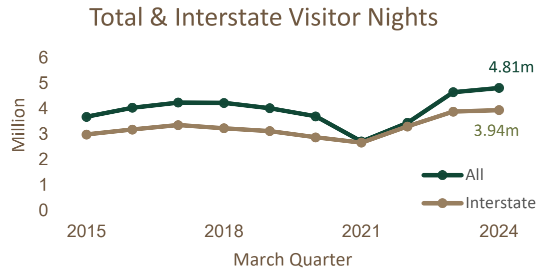
MARCH 2024 QUARTER

Spend in the March quarter of 2024 totalled $1.34b, falling 9% from the record high seen in the same quarter of 2023 ($1.47b), as visitors spent around 13% less each on their stay in Tasmania. Compared to 2019, visitors spent an additional $832 each on average in this quarter, leading to total expenditure increasing 38% - or $360m – over the last four years.

Average length of stay (10.5 nights) for interstate holiday visitors has returned to similar levels seen pre-COVID, however the average across all interstate visitors has remained at the elevated level of around 11 nights (10.8 March quarter 2024, up from 8.4 in 2019) seen since 2021 due to longer stays by trips to visit friends or relatives (VFR) in Tasmania, with slightly more of these visitors also having already visited once in the previous 12 months.







MARCH QUARTER	All Visitors			Interstate Visitors		
	2024	Annual Change	Change on 2019[3]	2024	Annual Change	Change on 2019
SPEND	$1.34B	-9%	+37%	$1.07B	-14%	+37%
VISITORS	446,700	+5%	-1%	363,600	0%	-2%
NIGHTS	4.81M	+4%	+20%	3.94M	+2%	+26%
ASPV	$3,002	-$449	+$832	$2,940	-$478	$+$837
ASPN	$279	-$39	+$35	$271	-$48	+$22
ALOS (NIGHTS)	10.9	-0.1	+1.9	10.8	+0.1	+2.4

REGIONAL VISITATION

In the March quarter of 2024, the Southern and East Coast tourism regions set new visitation records for any previous quarter. All regions except the East Coast also set new records for nights in a quarter. Within the WxNW tourism region, both the North West and West Coast saw a 24% increase each in nights; however, as the North West accounts for around 79% of nights in the tourism region, it's growth in actual number of nights was almost four times greater than the West Coast, largely due to an influx of visitors in Tasmania to see friends or relatives.

ALL VISITORS	Visitors			Nights		
	2024	Annual Change	Change on 2019	2024	Annual Change	Change on 2019
SOUTHERN	380,200	4%	4%	2,205,200	2%	20%
NORTHERN	258,100	4%	1%	857,800	25%	11%
W X NW	205,600	-2%	8%	987,200	6%	24%
EAST	179,200	5%	22%	442,700	-1%	16%

INTERNATIONAL VISITATION

International visitation data on this page comes from Tourism Research Australia's International Visitor Survey (IVS).

Post-pandemic international travel into Australia and Tasmania continued to increase throughout 2023, with Tasmania's share of all international visitors to Australia at 3.1% (3.2% in 2019), and 4.6% of holiday visitors (5.1% in 2019).

	SPEND	VISITORS	NIGHTS
VISITATION TO AUSTRALIA	$46.794B +5% on 2019	7.178M -16% on 2019	266.67M -1% on 2019
VISITATION TO TASMANIA	$417.2M -15% on 2019	236,400 -21% on 2019	4.27M -4% on 2019

56% Int'l Visitors

TOP 5 VISITOR COUNTRY OF ORIGIN	YE Mar 2019	YE Mar 2024	Change on 2019
United States of America	41,300	41,400	+2%
United Kingdom	27,500	24,100	-12%
China	48,700	20,600	-58%
Hong Kong	25,700	18,100	-30%
New Zealand	21,400	16,200	-24%
Germany	10,100	11,500	+14%
Other Countries	124,200	104,500	-16%
TOTAL INTERNATIONAL VISITORS TO TASMANIA	298,900	236,400	-21%

INTRASTATE VISITATION

Intrastate visitation data on this page comes from Tourism Research Australia's National Visitor Survey (NVS).

Tasmanians spent over $1.8billion on trips within the state in the year ending March 2024, across overnight trips ($1.05b) and day trips ($800m).

Tasmanians took 17% more overnight trips within the state compared to the previous year, with trips lasting an average of 2.4 nights away (on par with 2019). As Tasmanians didn't change their trip length, this has led to a decrease in spend per night to $252 (down 13%, or $38 per night).

Spend by Tasmanians taking overnight trips for a holiday was up 4% to $406million, with the number of trips taken up 16% on year ending March 2023.

	YE Mar 23	YE Mar 24	Annual Change	Change vs YE Mar 2019
OVERNIGHT TRIPS	1.48m	1.73m	+17%	+2%
SPEND	$1.03b	$1.05b	+2%	+21%
NIGHTS	3.54m	4.16m	+1%	-6%

DAY TRIPS	5.94m	5.23m	-12%	-20%
SPEND	$745m	$801m	+8%	+17%

INTERNATIONAL VISITORS TO TASMANIA

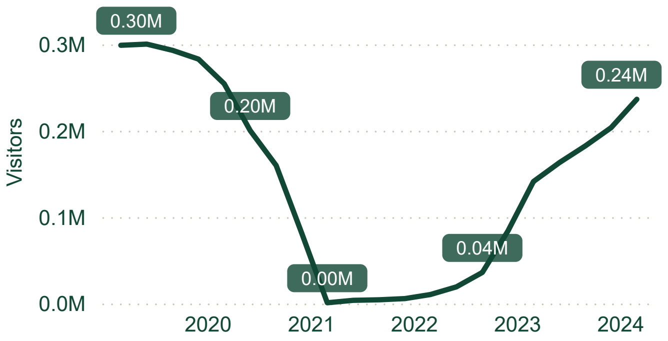
ALL VISITORS

236.40K	4.27M	$417M	18.05	$1,765	$98
Visitors	Nights	Spend**	ALOS (Nights)	ASPV	ASPN
▲ 67.4%	▲ 110.8%	▲ 56.8%	▲ 25.9%	▼ -6.3%	▼ -25.4%
79% of 2019	96% of 2019	85% of 2019	2019: 14.8	2019: $1639	2019: $110

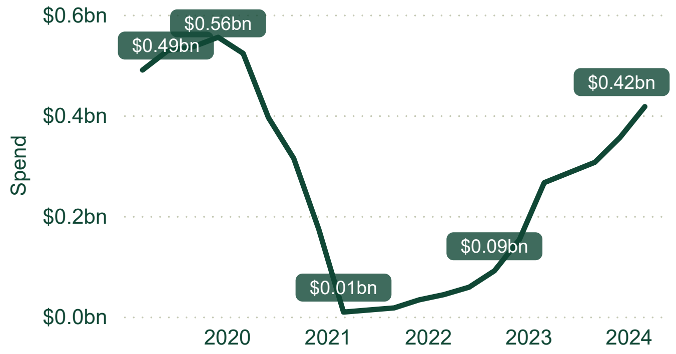
HOLIDAY VISITORS

174.83K	2.00M	$263M	11.44	$1,504	$131
Visitors	Nights	Spend**	ALOS (Nights)	ASPV	ASPN
73% of 2019	93% of 2019	89% of 2019	2019: 9	2019: $1234	2019: $137

ROLLING ANNUAL VISITATION TO TASMANIA



ROLLING ANNUAL SPEND IN TASMANIA



PRIMARY INTERNATIONAL SOURCE MARKETS

Markets	Visitors	Nights '000	Spend $m	ALOS (nights)	ASPV	% Share visitors from country: HOL	VFR	BUS	EDU	Other
USA	41,400	341	53	8.2	$1,269	80%	19%	2%		1%
UK	24,100	394	37	16.3	$1,527	66%	27%	6%	2%	7%
China	20,600	282	25	13.7	$1,237	66%	33%		1%	
Hong Kong	18,100	198	48	10.9	$2,658	98%	6%		0%	14%
New Zealand	16,200	163	35	10.1	$2,141	70%	23%	9%		5%
Singapore	6,500	39	13	6.0	$2,008	90%	9%		1%	

▲ Increase
▼ Decrease
+ % Change is from previous year.
++ IVS data up to December 2022 is based on imputations from pre-COVID visitor behaviours. Interviews resumed in January 2023.
* The IVS records purpose of visit per stopover, so a single 'trip' will include multiple purposes and therefore may add to more than 100%.
^ % 2019 refers to comparison to *calendar year* 2019

ALOS: Average length of stay (nights)
ASPV: Average spend per visitor
ASPN: Average spend per night.
The International Visitor Survey interviews 40,000 overseas travellers in person in Australia's eight major international airports.
The IVS is conducted by Tourism Research Australia

INTRASTATE TRIPS WITHIN TASMANIA

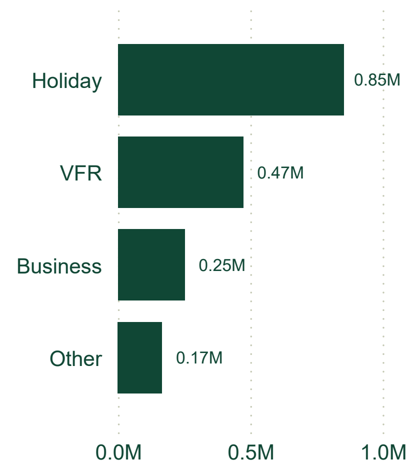
OVERNIGHT TRIPS

1.73M	4.16M	$1.05bn	2.4	$252	$605
Trips	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPT	ASPN
▲ 16.5%	▲ 17.3%	▲ 1.7%	▲ 0.8%	▼ -13.3%	▼ -12.7%

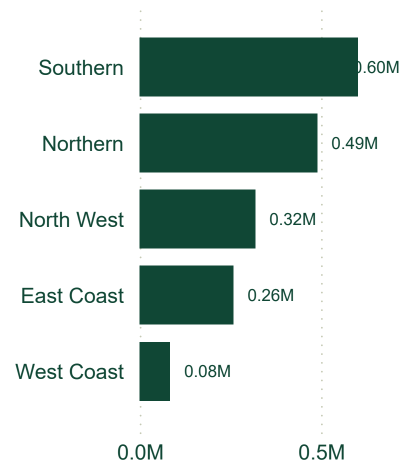
HOLIDAY OVERNIGHT TRIPS*

853.72K	2.07M	$406M	2.4	$196	$476
Trips	Visitor Nights	Visitor Spend	ALOS (Nights)	ASPT	ASPN
▲ 15.6%	▲ 13.4%	▲ 4.1%	▼ -1.9%	▼ -8.2%	▼ -9.9%

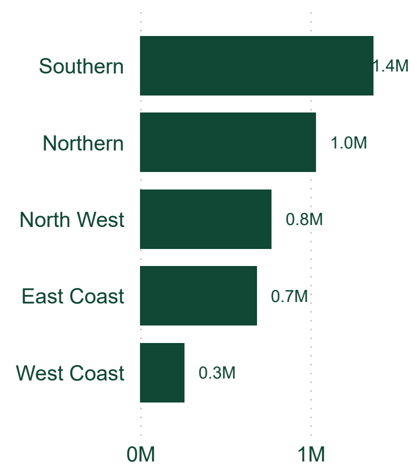
PURPOSE OF OVERNIGHT TRIP



OVERNIGHT TRIPS IN REGIONS



NIGHTS IN REGIONS



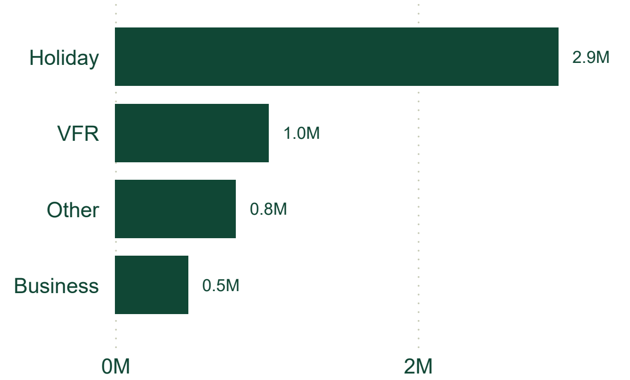
DAY TRIPS

5.23M	$801M	$153
Trips	Spend	ASPT
▼ -12%	▲ 7.4%	▲ 22.1%

HOLIDAY DAY TRIPS^

2.93M	$457M	$156
Trips	Spend	ASPT
▼ -5.6%	▲ 6.8%	▲ 13.1%

PURPOSE OF DAY TRIP



▲ Increase
▼ Decrease

% Change is from previous year.

*The NVS records purpose of visit per stopover, so a single 'trip' will include multiple purposes and therefore may add to more than 100%

ALOS: Average length of stay (nights);
ASPT: Average spend per trip;
ASPN: Average spend per night

The National Visitor Survey is a mobile phone survey of approximately 60,000 Australians annually. The NVS is conducted by Tourism Research Australia.

TASMANIAN ACCOMMODATION

Tourism Tasmania measures a range of metrics of visitation into the state and across the visitor economy. While only one sector of the visitor economy, accommodation data provides insight into the demand from travellers in the state.

Tourism Tasmania has engaged and works closely with two providers to deliver meaningful data that broadly represents the range of operators in Tasmania's accommodation sector.

STR GLOBAL - COMMERCIAL ACCOMMODATION

STR provides accommodation operators an opt-in system to add their data to an anonymous aggregate report, drawing on a broad capture of platforms and booking systems, across a wide range of accommodation types. STR takes into account operator size, rating, brand affiliation and rates.

The STR occupancy data provides insight for four regions; Hobart and the South, Launceston and the North, East Coast, and North West. The zones align with the state's Tourism Regions, except for the North West which excludes the West Coast due to insufficient sample.

Tourism Tasmania actively encourages providers of hotel, motel, lodge or similar accommodation to contribute to this anonymous dataset to continually improve the reliability of the data. Please contact Jacqueline (jchoo@str.com) to contribute anonymously to industry insights and monitoring, and access your own bespoke complimentary report.

AIRDNA - SHORT-STAY ACCOMMODATION

AirDNA provides an indicative view of the shortstay accommodation sector, including holiday homes, shacks, homes and self-contained apartments, as well as some traditional bed and breakfasts, listed on on Airbnb or VRBO.

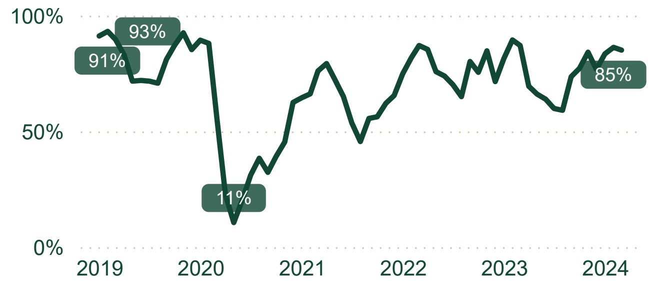
Data is provided across multiple regions, offering a view of urban and regional performance. Data in this snapshot refers only to 'entire properties', where guests have the entire home, hotel room or apartment to themselves; approximately 89% of listings in Tasmania. This can be a standalone building or self-contained apartment.

AIRDNA REPORTING ZONE	REGIONS INCLUDED
HOBART	Hobart City Council
LAUNCESTON	Launceston City Council
WEST COAST	West Coast Council
BRUNY ISLAND	North & South Bruny Island
TASMAN PENINSULA	Tasman Council
HUON - FAR SOUTH	Huon Valley Council
KING ISLAND	King Island Council
FLINDERS ISLAND	Flinders Council
DERBY	Derby, Branxholm, Ringarooma, Pioneer
EASTERN SHORE (HOBART)	Geilston Bay to Transmere, incl. Mornington
ORFORD	Orford, Spring Beach, Triabunna, Little Swanport
FREYCINET	Coles Bay, Swanwick, Bicheno, Swansea
NORTH WEST	Circular Head, Waratah-Wynyard, Burnie, Devonport, Central Coast, Kentish & Latrobe LGAs
NORTH EAST COAST	Bay of Fires, St Helens, Wellborough, Douglas River
EAST TAMAR - BRIDPORT	George Town Council, Bridport
DELORAINE - EVANDALE	Deloraine, Mole Creek, Westbury, Evandale

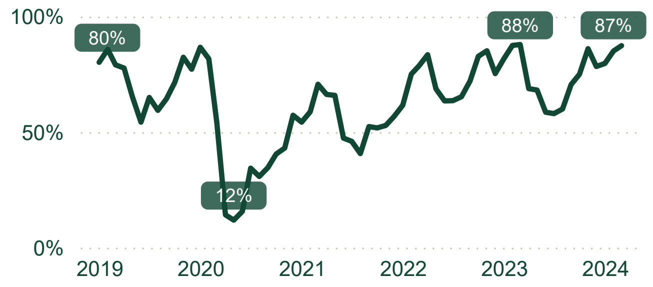
COMMERCIAL ACCOMMODATION IN TASMANIA

OCCUPANCY BY MONTH

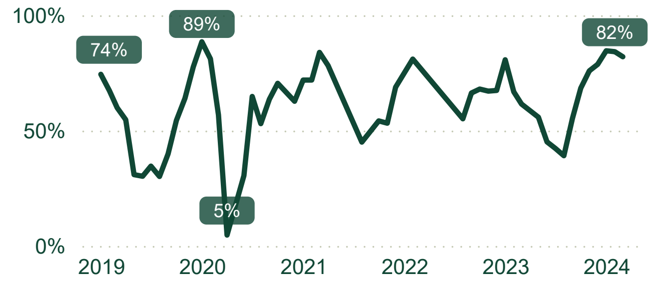
Hobart & the South



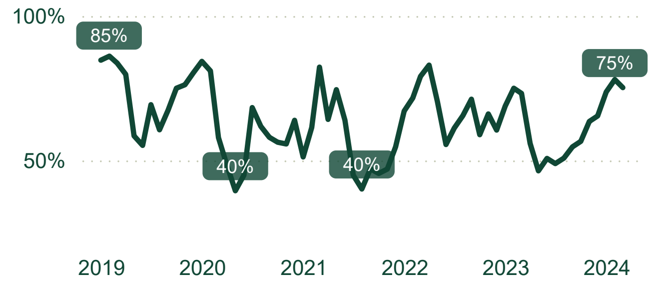
Launceston & the North



East Coast

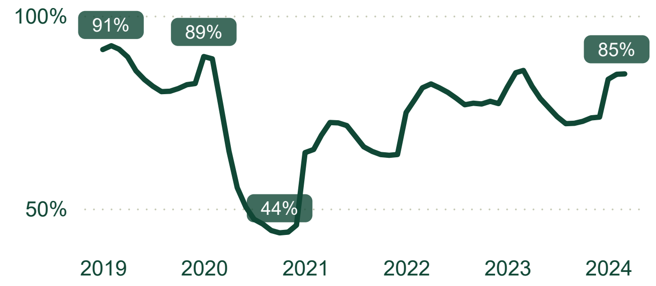


North West

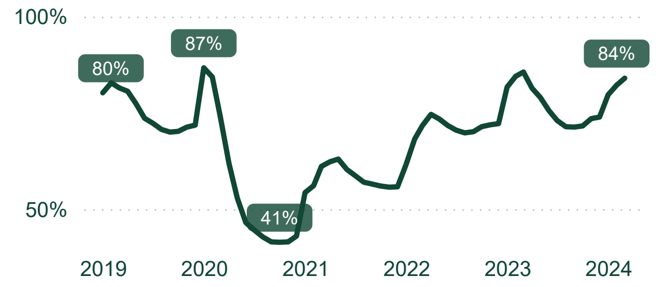


OCCUPANCY BY ROLLING YEAR ENDING

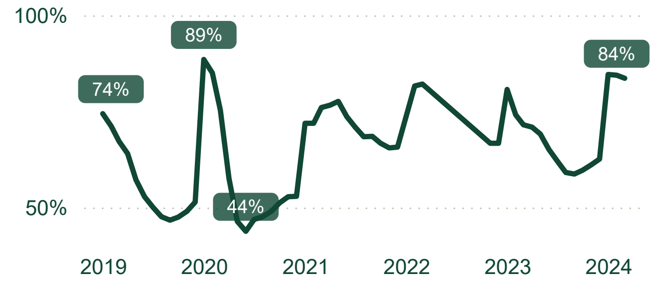
Hobart & the South



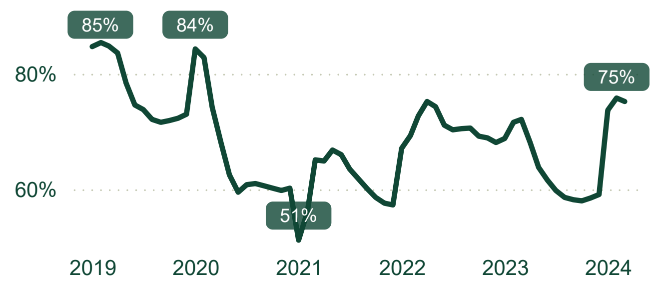
Launceston & the North



East Coast



North West



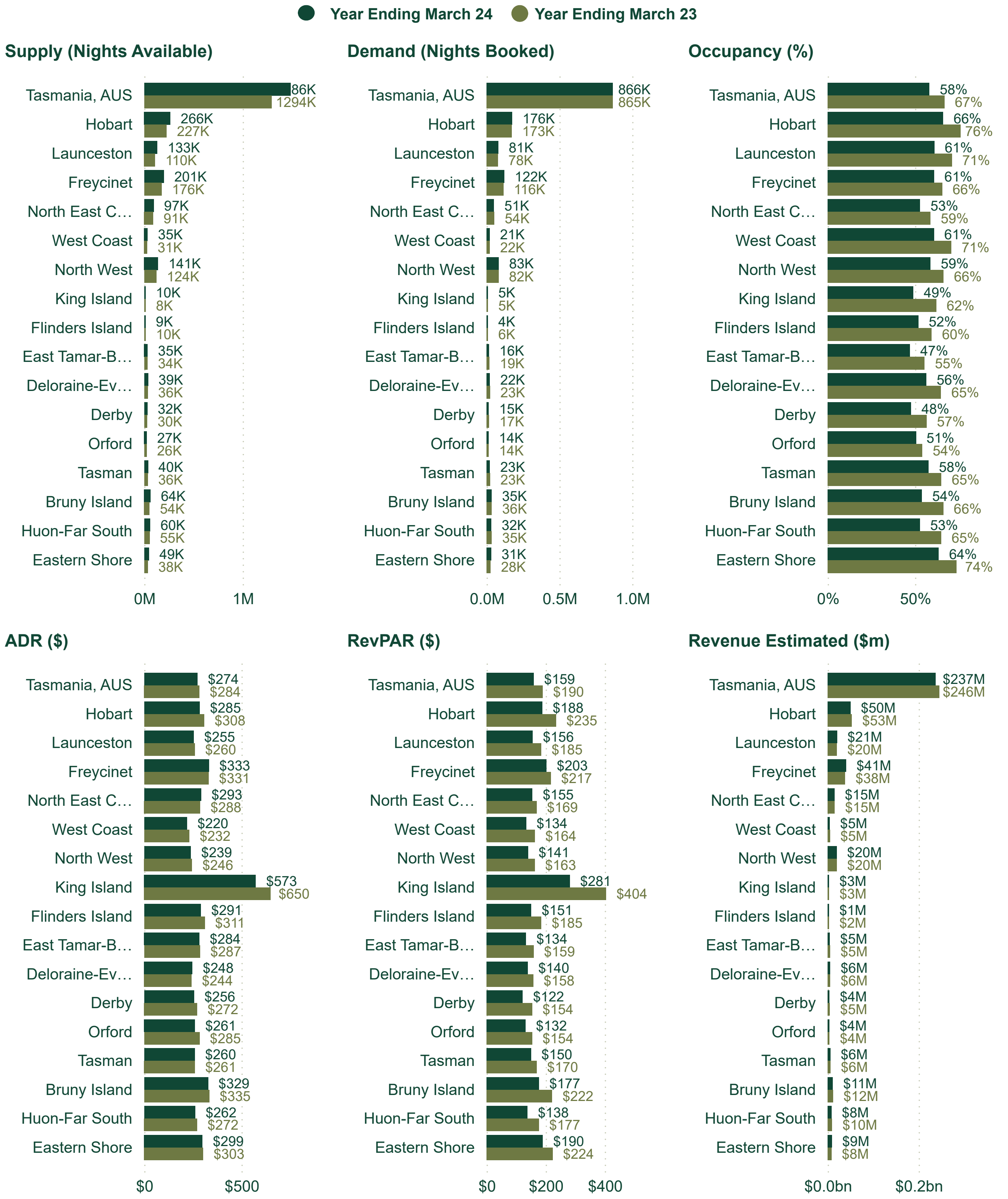
Source: CoSTAR UK

Some months are omitted due to insufficient sample.

Accommodation operators are invited to contact Jacqueline (jchoo@str.com) to access your own bespoke complimentary report and contribute anonymously to industry insights and monitoring.

Image: Lake Oberon, Western Arthur Range, Mark Reid.

SHORT-STAY ACCOMMODATION IN TASMANIA



Source: AirDNA
Data shown is for 'entire properties' only.
% change is compared to the previous year.
Image: Lake Oberon, Western Arthur Range, Mark Reid

Revenue, ADR and RevPAR are converted from USD at exchange rate of 1.50 as at 19 June 2024 for YE March 2024 totals and therefore AUD contribution is estimated only. Includes cleaning fees but not other Airbnb or VRBO service fees.

ABOUT THIS SNAPSHOT

The Tasmanian Tourism Snapshot is published every quarter, using the latest figures from the Tasmanian Visitor Survey (TVS) and supplementary sources to provide you with an overview about international and interstate visitors to Tasmania, as well as intrastate travel by Tasmanians. Accommodation data from AirDNA and STR are also featured. More detailed statistics are available at Tourism Tasmania's corporate website at www.tourismtasmania.com.au/research and via the interactive TVS Analyser www.tvsanalyser.com.au

DATA SOURCES

TASMANIAN VISITOR SURVEY (TVS)

The TVS is an exit survey designed to provide a profile of the characteristics, travel behaviour and expenditure of international and domestic visitors to Tasmania. It is nationally acknowledged as the most reliable source of statistical data on visitors to Tasmania, and is based on a sample of more than 9,000 departing visitors per year. Interviews take place at the states' four main airports, as well as the Spirit of Tasmania terminal. www.tourismtasmania.com.au/research/tvs

INTERNATIONAL VISITOR SURVEY (IVS)

NSW holiday-makers exceeded 2019 levels (+7%), with The IVS is administered by Tourism Research Australia. The IVS is the most comprehensive source of information on international visitors to Australia. Prior to COVID-19 the IVS sampled, on average, 40,000 departing, short-term international travellers in the departure lounges of eight international airports across Australia (not including Hobart). Between April 2020 and December 2022 the IVS utilised incoming passenger cards and algorithms supplemented by surveys. January 2023 saw the full re-introduction of survey-based sampling. www.tra.gov.au/international

NATIONAL VISITOR SURVEY (NVS)

The NVS is also administered by Tourism Research Australia, and samples approximately 60,000 Australians annually. Unlike the IVS, the NVS continued uninterrupted during the COVID pandemic as it is entirely based on mobile phone calls. The NVS provides the only nationally comparable travel data for Tasmanians within their own state. www.tra.gov.au/domestic

A NOTE OF CAUTION

You are advised to exercise care when interpreting figures contained in this report and the TVS Analyser. Figures are an estimate based on a sample of visitors, and may, therefore, be different from the real figure if data from 100% of all visitors could have been collected. These estimates may be subject to chance variation or sampling error, and smaller estimates under 5,000 must be treated with greater caution. Figures that show a change ≤ 2 per cent are shown as remaining steady due to sampling variability, please view the Confidence Interval Tables for further information, available at www.tourismtasmania.com.au/research/tvs.

NOTES

1. Annual change refers to the percentage change between the year covered by this snapshot compared to the year prior.
2. All visitors refers to interstate and international, excludes intrastate (Tasmanians).
3. Change on 2019 refers to the percentage change between the year covered by this snapshot compared to the same period in 2019.